

## TOPIC 5: SAM II HR/PAYROLL DATA WAREHOUSE APPENDIX

The objectives of this appendix are to present documents that provide support for understanding the SAMII HR/PAYROLL Data Warehouse. The first document is a listing of the table long descriptions in the Data Model by Table Code Name order. To facilitate table relationship research, a second document with SAM II HR/Payroll table charts is included for the areas of Deductions, Benefits, Leave, and Pay. The third document is a sample Reports Design Template, illustrating the information needed to analyze and create a report. Also, a Reports Methodology Flow Chart is provided and summarizes the necessary steps in analyzing the data.

### You will be able to use these documents to:

- Find a long description of a Table
- Research the basic functional relationships between SAM II HR/Payroll tables
- Create a report design document using the Reports Template
- Follow the flow chart's steps to analyze data

Must replace with  
report from Data  
Model Viewer.

## HR DATA MODEL

### BY TABLE CODE NAME ORDER

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
BKG_ADDR	Address Background Table	The Employee Address Background Table stores current and historical records of the employee's mailing address. Also stores the employee's home county, state, and country.
BKG_APCT	Applicant Background Table	The Applicant Background Table stores applicant IDs and full names, by internal ID number.
BKG_APEV	Applicant Evaluation Profile Background Table	The Applicant Evaluation Profile Background Table stores basic appointment information. It records the employee's date of appointment, probationary period, and pension information. All appointment-related information pertains to a position the employee holds within the organization. If an employee within your organization holds more than one position at the same time, an Employee Appointment table entry will exist for each position. For an employee with multiple positions, information will appear on the next two tables (Employee Assignment Table and Pay Parameter Table) for each Employee Appointment table entry.
BKG_APPT	Employee Appointment Background Table	The Employee Appointment Background Table stores current and historical records of the employee's home address, phone number, and mailing address.
BKG_APSA	Applicant Scheduled Activity Background Table	The Applicant Scheduled Activity Table stores a list of activities which need to be completed prior to hiring an applicant. For example, it might store dates of interviews or evaluations (e.g., typing test or physical exam).
BKG_APTS	Applicant by Test Score	The Applicant By Test Score Background Table stores the combined results of each applicant's evaluation associated with a job notice. This table permits selection of the most qualified applicant for a position.
BKG_AREF	Applicant Reference Background Table	The Applicant Reference Background Table stores a list of references for each applicant, identified by their first and last name. It stores the title, employer, address, city/state/county, zip-code, and phone number of the references.
BKG_ASGN	Employee Assignment Background Table	The Employee Assignment Background Table stores the history of an employee within an appointment. It includes data about each successive assignment within an appointment. There is one Employee Assignment

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		table entry for each assignment the employee holds while in the organization. If one of the fields on this table changes, a new assignment is created. This table includes the rules used to calculate pay for the employee, personnel information, and accounting attributes.
BKG_AUS1	Position User Defined Screen 1 Background Table	The Applicant Status User Defined Background Table stores site-specific information for applicants or applications. It is accessed by internal ID and, optionally, by the internal job notice ID. The data to be stored on this table is specified by the Applicant Tracking User Defined Fields table.
BKG_CCAN	Check Cancel Background Table	The Check Cancelled Background Table stores cancelled checks by check number and bank account code.
BKG_COND	Contract Detail Background Table	The Contract Detail Background Table stores details generated by smoothed contract pay processing. Contract pay details from each contract employee's paycheck are stored here.
BKG_CONP	Contract Summary Background Table	The Contract Summary Background Table stores pay amounts and counts for both contract actuals and contract earnings as applied to a contract period identification code. There is one table entry for each identification code for which an employee has earned or received contract pay.
BKG_D_EMP_RATE	Employee Rate Background Table	The Background Daily Emp Rate Table stores triggers that are used to recalculate an employee's pay. Each day this table is purged and repopulated with records with employees who had rate changes
BKG_DEDO	Deduction Option Background Table	The Deduction Option Background Table stores employee-specific information associated with a deduction. This information might include the employee's goal amount, electronic funds transfer information, savings bond beneficiaries, or family court docket numbers.

<b>TABLE_NAME</b>	<b>TABLE_DESCRIPTION</b>	<b>TABLE_DESC</b>
BKG_DEDP	Deduction Parameters Background Table	The Deduction Parameter Background Table stores the list of permanent deductions and fringe benefits that are calculated for an employee on a regular basis. This includes voluntary and involuntary deductions, fringe benefit profile information and optionally, additional state and local taxes. Deductions and fringe benefits that apply to all appointments an employee has are identified with an asterisk (*) in the appointment ID field. Appointment-specific deductions have a specific appointment ID, or have a blank for the primary appointment. FICA or Medicare deductions and federal tax deductions are driven by FICA Class and Tax Class, respectively, and are not listed on this table.
BKG_DPBN	Dependent Benefits Background Table	The Dependent Benefits Background Table stores information regarding benefit coverage for dependents. It records, on a dependent-by-dependent basis, any specific coverage rules that differ from the default for a Benefit Type Class and Sub-Class group of benefit programs. It also stores free-form comments.
BKG_DPND	Dependent Background Table	The Dependent Background Table stores spouse and dependent information (e.g., relationship, sex, and birthdate) used in the administration of benefits.
BKG_EEDH	Employee Education History Background Table	The Employee Education History Background Table stores information about an employee's education history, such as degrees earned and/or in progress, majors, credits, and grade point averages. Applicant education history is also stored here so that the information does not need to be reentered when the applicant is hired.
BKG_EEO6	EEO6 Employee Background Table	The EEO6 Employee Background Table stores EEO-6 reporting information for each employee. It is accessed by employee ID, as well as the year and month of the information.
BKG_EFTC	Electronic Funds Transfer Background Table	The Electronic Funds Transfer Background Table stores cancelled EFT information generated by canceling an employee's check on the CHCK transaction.
BKG_EIND	Incident Detail Background Table	The Incident Detail Background Table stores details about each incident or grievance. To track the progress of a given incident/grievance case, a new table entry is added whenever the status of the case changes.
BKG_EMER	Emergency Contact Background Table	The Emergency Contact Background Table stores optional information about an employee's emergency contacts such as address, home or work telephone

## HR DATA WAREHOUSE

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		numbers, and the relationship of the contact to the employee. This is not an effective-dated table.
BKG_EMID		
BKG_EMPH	Employee History Background Table	The Employee History Background Table stores changes applied to an employee's personal data. The data stored here is a history of updates to the Employee Table.
BKG_EMPL_TRANSFER	Employee Transfer	
BKG_ENMH	Employee Name History Background Table	The Employee Name History Background Table stores the name history for employees and applicants. It is indexed by external ID and effective date.
BKG_EPEC	Performance Detail Comment Background Table	The Performance Detail Comment Background Table stores comments on an evaluation of an employee for a given evaluation period.
BKG_EPEV	Performance Summary Background Table	The Performance Summary Background Table stores information on an employee's performance evaluation, as well as recommended salary and title information, for a given evaluation period.
BKG_ESKL	Skills Profile Background Table	The Skills Profile Background Table stores an employee's skills. Applicant skills are also stored here so that the information does not need to be reentered when the applicant is hired.
BKG_ESML	Employee Assignment Background Table	The Employee Status Maintenance Log Background Table stores an audit trail of ESMT transactions by day and time. It may be used to track multiple personnel actions occurring in the same day. This table is populated when the SPAR entry 'USE ESML LOGGING' is set to Y (yes).
BKG_ETRP	Training Profile Background Table	The Training Profile Background Table stores information about each course, both in-house and external, that an employee has taken, is taking, or is scheduled to take. Applicant training information is also stored here, so that it does not need to be reentered if the applicant is hired.
BKG_EWRK	Prior Work Profile Background Table	The Prior Work Profile Background Table stores information which describes the previous employment experience of an employee. Applicant work histories are also stored on this table so that this information does not need to be reentered if the applicant is hired.
BKG_FICA	FICA Table	The FICA Background Table stores information about FICA covered wages by quarter and includes employee and employer FICA deduction amounts. There is one table for each calendar year. For employees who contribute to both Social Security and Medicare, two records will exist for each year. This

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		summary information is employee-specific.
BKG_INCC	Incident Detail Comments Background Table	The Incident Detail Comments Background Table stores comments on a given incident or grievance.
BKG_JBIC	Job Interview Comments Background Table	The Job Interview Comments Table stores the text of an interview evaluation and is keyed by interviewer ID.
BKG_JNOT	Job Notice Background Table	The Job Notice Background Table stores job notice data. It contains current status information, contact person information, number of openings to be filled for the particular posting, and any override information (e.g., requirements or minimum and maximum pay amounts) which differs from the norms for the job notice as defined by the Applicant Tracking Title Group code.
BKG_JNSA	Job Notice Schedule Activity Background Table	The Job Notice Scheduled Activity Background Table stores a schedule of events which need to be tracked and completed during the duration of the job posting (e.g., place ad in local newspaper, post opening internally, select applicants for interview, etc.). It is keyed by both the internal job notice ID number and an activity code.
BKG_JOBA	Job Application Background Table	The Job Application Background Table stores application-specific information for an applicant. For example, it includes the status of the application, referrals, and preferences of the applicant (e.g., available starting date, seasonal or temporary preferences, agency, and geographic preferences).
BKG_JOB1	Job Interview Background Table	The Job Interview Background Table stores recommendation and rating information recorded by an interviewer for an applicant and the job notice for which the applicant is applying.
BKG_JUS1	Position User Defined Screen 1 Background Table	The Job Notice User Defined Screen Background Table stores site-specific information for job notices. It is accessed by internal job notice ID. The data to be stored is specified by the Applicant Tracking User Defined Fields table.
BKG_LCNS	License Background Table	The License Background Table stores employee license and certificate information. Data such as expiration date, state of issue, and license number are stored on this table. Applicant licenses and certificates are also stored on this table so that this information does not need to be reentered if the applicant is hired.
BKG_LVDT	Leave Detail Background Table	The Leave Detail Background Table stores the details of each leave event for each employee. Information found on this table includes: leave type, timesheet identification, event date, amount, process date, and

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		whether the leave type originally submitted is the same as the leave type used. There is one table entry per event. Leave Details serve as an audit trail of all leave activity, accruals, and usages for each employee.
BKG_PASS	Pass Background Table	The Pass Background Table stores pass information for each employee.
BKG_PAYP	Pay Parameter Background Table	The Pay Parameter Background Table stores the salary history of each assignment. The information includes pay type and optionally, rate or amount. There is one table entry for each pay parameter. Each employee assignment has its own set of pay parameters which have expiration and effective dates that fall within the bounds of the assignment under which they exist.
BKG_PCHD	Pay Check Table	The Pay Check Background Table stores the details of each pay check including: the bank account, check number, processing date, check date, pay period dates, check amount, check disposition, appointment data, and FICA information. There is one entry for each check. The Pay Check table and the associated details build a pay history to facilitate any retroactive activity and to support management analysis.
BKG_PHST	Position Table	The Position History Background Table stores the history of a position's attributes. This table includes attributes that would be assigned to employees hired into the position, including personnel rules and accounting information.
BKG_PSAT	Position Authorization Background Table	The Position Authorization Background Table stores information regarding the number of employees which can be and have been hired to work in a particular position. It includes Incumbent and Full-time Equivalent (FTE) counts.
BKG_PSBH	Position Budget History Background Table	The Position Budget History Background Table stores a history of all adjustments made to the budgeted amounts recorded against a Position Control budget. These adjustments are entered using the Position Budget Maintenance transaction (PBMT) and this table is an audit trail of those transactions.
BKG_PSID	Internal Position ID by Position Number Reference Table	The Internal Position ID by Position Number Background Table is an alternate index that stores internal position IDs by external position ID

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		(agency/organization/position ID).
BKG_PUD1	Position User Defined Screen 1 Background Table	The Position User Defined Screen Background Table stores site-specific position-related information. The data to be stored is specified by the Position User-Defined Fields screens.
BKG_PUD2	Position User Defined Screen 2 Background Table	The Position User Defined Screen Background Table stores site-specific position-related information. The data to be stored is specified by the Position User-Defined Fields screens.
BKG_PUD3	Position User Defined Screen 3 Background Table	The Position User Defined Screen Background Table stores site-specific position-related information. The data to be stored is specified by the Position User-Defined Fields screens.
BKG_REMARKS	MESH Remarks Extract	The Remarks Table stores an historical list of the remarks that have been associated with each employee.
BKG_RESP	Reserve Summary Background Table	The Reserve Summary Background Table stores a record of pay reserved for future payout by category within contract period identification code. There is one table entry for each identification code for each category. This summary information is employee-specific and supports the tracking of reserve pay.
BKG_SSN		The Social Security Number Background Table stores internal employee id numbers by employee social security number.
BKG_TAXO	Employee Tax Parameter Table	The Employee Tax Parameters table stores employee tax information used for state and federal withholding.
BKG_TENM	Tenure Status Background Table	The Tenure Status Background Table stores data on an employee's tenure and supports the automatic creation of tenure-related history and tracking data.
BKG_USR1	Position User Defined Screen 1 Background Table	The User Defined Screen 1 Background Table stores site-specific information for employees. The data to be stored is specified by the User Defined Fields table.
BKG_USR2	Position User Defined Screen 2 Background Table	
BKG_USR3	Position User Defined Screen 1 Background Table	
BKG_USR4	Position User Defined Screen 4 Background Table	
BKG_USR5	Position User Defined Screen	



TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
	5 Background Table	
BKG_USR6	Position User Defined Screen 6 Background Table	
BKG_USR7	Position User Defined Screen 7 Background Table	
BKG_USR8	Position User Defined Screen 8 Background Table	
BKG_USR9	Position User Defined Screen 9 Background Table	
BKG_VETR	Veteran Table	The Veteran Table stores current information about an employee's military rank, discharge type and date, and any retroactive seniority as a result of the individual's military service. If applicable, this information helps to coordinate the process of veteran's preference on civil service lists. NOTE: This is not an effective-dated table, so any updated information will replace the previous information.
EXT_DED_DET AIL	PCEF Deduction Detail Extract	The Deduction Detail Extract Table stores deduction details for each payroll run.
EXT_GL_DED_ DETAIL	PCEF Pay Detail Extract	
EXT_GL_PAY_D ETAIL	PCEF Pay Detail Extract	
EXT_LEAVE_B ALANCE	Leave Balance Extract	The Leave Balance Extract Table stores leave balance data for each payroll run.
EXT_PAY_DET AIL	PCEF Pay Detail Extract	The Pay Detail Extract Table stores detailed employee pay information for each payroll run.
EXT_PCEF_EMP L_ATTR	PCEF Employee Attributes Extract	The Employee Attribute Pay Cycle Extract File Table stores employee attributes valid at payroll run time.
EXT_PCEF_HEA DER	PCEF Header Record Extraction	The Pay Cycle Extract File Header stores payroll processing data specific to each payroll run.
REF_A21C	A21 Category Reference Table	The A21C Reference Table stores a list of valid A-21 category codes. This allows effort charged to a single account to be sub-divided into multiple components (e.g. public service, departmental research). These codes will also support ad hoc management reporting.
REF_A21F	A21 Function Reference Table	The A21F Reference Table stores A-21 activity codes, along with their corresponding A-21 category codes. The effective date and short and long descriptions are stored for each activity.
REF_A21R	A21 Reporting Period Reference Table	The A21R Reference Table stores dates associated with the A-21 reporting period and allows control flags to be set on this period, such as when it is closed and when offline programs may select data.

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
REF_AGYX	Extended Agency Reference Table	The Extended Agency Reference Table stores the EEO Function and type of EEO report in which the agency/organization combination must be included. It also indicates whether an agency defines positions at the agency or organization level (if it is not specified at the site level), and specifies the taxing entity code for multiple employer sites.
REF_APSR	Applicant Status Reason Reference Table	The Applicant Status Reason Reference Table stores a list of reasons which can be associated with an applicant's status.
REF_APST	Applicant Status Reference Table	The Applicant Status Reference Table stores a list of available statuses used in conjunction with job applications. Values on this table also indicate whether or not a status will allow appointment or whether or not it is active.
REF_ASDF	Applicant Selection Definition Background Table	The Applicant Selection Definition Reference Table stores codes which define criteria used to build recommended applicant lists for the Recommended Applicants inquiry.
REF_ATTG	Applicant Tracking Title Group Reference Table	The Applicant Tracking Title Group Table stores a list of available title groups with information such as pay policy job requirements and salary minimum and maximum. This table is used to establish a set of characteristics for job openings which share the same title group.
REF_ATTN	Attorney Code Reference Table	The Attorney Reference Table serves as an historical list of valid attorneys.
REF_ATVY	Applicant Tracking Activity Reference Table	The Applicant Tracking Activity Reference Table lists available codes to identify activities for which an applicant or job notice may be scheduled.
REF_AUDF		
REF_BPCL	Benefit Plan Class Table	The Benefit Plan Class Reference Tables stores codes for the aggregation of benefit programs at the Deduction Plan level.
REF_BTCL	Benefit Type Class Reference Table	The Benefit Type Class Reference Table stores codes defining the highest level of aggregation of benefit programs, such as health, pension, life insurance, or deferred compensation.
REF_BTSC	Benefit Type Sub Class Reference Table	The Benefit Type Sub-Class Reference Table stores codes defining an additional aggregation at the Deduction Type level, which is used in conjunction with Benefit Type Class.
REF_CATG	Event Category Reference Table	The Event Category Reference Table stores categories for summarizing pay, leave, and deduction events. It defines the type of category (e.g., pay and leave), leave accrual options, check printing options, and whether

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		the category is a fringe.
REF_CCPR	Client Compensatory Profile Reference Table	The Client Compensatory Profile Reference Table stores valid client compensatory codes. The table stores "straight time" plans, including "straight time" pay types and information required to accrue compensatory time in lieu of overtime pay.
REF_CGRD	Course Grade Reference Table	The Course Grade Reference Table stores the possible grades that employees can receive for courses given at a particular school.
REF_CHRL	Chart Rule Reference Table	The Chart Rule Reference Table stores a mechanism for identifying leave accrual and pay rates that are to be used for employees hired at different times. For example, if employees in the same title and pay or leave policy hired prior to 01/01/80 are paid or accrue leave based on one set of rates while employees hired on or after 01/01/80 are paid or accrue leave at a second rate, two chart entries can be established to allow table-driven pay or leave accrual rates for both groups. The employee's Original Date of Appointment is used to calculate which Chart code is used to determine their pay or accrual rate.
REF_CIVS	Civil Service Status Reference Table	The civil Service Status Reference Table stores the Civil Service Status codes that support coordination of civil service processing for employees.
REF_CNTY	County Code Reference Table	The County Reference Table stores an historical list of valid counties.
REF_CORT	Court Reference Table	The Court Reference Table stores address, phone, and fax data for each valid court record.
REF_CPID	Contract Period Identification Reference Table	The Contract Period ID Reference Table stores contract period codes, their descriptions, and effective dates. These codes are entered in the CONTRACT PERIOD IDENTIFICATION CD field, which is on the Contract/Reserve Pay Policy (CPOL) table.
REF_CPOL	Contract/Reserve Pay Policy Reference Table	The Contract/Reserve Pay Policy Reference Table stores and defines the default rules to be used for contract and/or reserve pay processing for a pay

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		policy.
REF_CRSE	Course Reference Table	The Course Reference Table stores codes representing the courses in which employees can be enrolled or may have taken.
REF_CTRY	Country Reference Table	The Country Reference Table stores and defines valid abbreviations for countries. The table also identifies whether or not a state (province, etc.) is required as part of an address.
REF_CYCL	Pay Cycle Reference Table	The Pay Cycle Reference Table stores and defines the parameters used in payroll processing. A single pay cycle represents sets of employees who are paid at the same time as indicated by payroll number. Each entry in the pay cycle table represents a beginning (effective) and ending (expiration) date for a payroll cycle. For the defined period of time, pay cycle attributes such as check date, FLSA cycle, and deduction frequencies are specified.
REF_DDPL	Deduction Policy Type Reference Table	The Deduction Policy Type Reference Table stores the set of deduction types and plans included in the deduction policy. It is possible for a policy to include a deduction type and all of its associated plans or only certain plans.
REF_DEDA	Deduction Plan Alternate Rates Reference Table	The Deduction Plan Alternate Rates Reference Table stores alternate deduction rates that allow deductions to be based upon elapsed time. This table is most commonly used in conjunction with alternate rate date information on the Deduction Plan Table (DPLN) to calculate age-based rates for deductions like group term life.
REF_DEDF	Deduction Frequency Reference Table	The Deduction Frequency Reference Table stores deduction frequency codes. These codes are used to control the processing of deductions (and fringe benefits) which are not taken each pay period.
REF_DEDT	Deduction Type Reference Table	The Deduction Type Reference Table stores and defines each deduction and includes specific information for use in calculating deductions during the Gross-to-Net process.
REF_DEDX	Marginal Tax Rates Reference Table	The Marginal Tax Rates Reference Table stores the marital statuses, wage brackets, and tax rates for each deduction type and plan that requires marginal rate processing (e.g., federal tax withholding).
REF_DEFB	Deduction / Fringe Benefits Reference Table	The Deductions/Fringe Benefits Reference Table stores data to classify and summarize an employee's deduction and benefit records into the appropriate

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		AAUP and/or IPEDS groupings.
REF_DEGR	Degree Reference Table	The Degree Reference Table stores each degree code for use in establishing information about an employee's educational history.
REF_DEPARTM ENT	MESH Department	The Department Reference Table stores attributes related to MESH and Pre-SAMII department codes. In SAMII, the department is referred to as an agency.
REF_DEPT_CLA SS	MESH Department Class	The Department Class Reference Table stores attributes related to MESH and Pre-SAMII department class codes. In SAMII, the department class code is referred to as a title.
REF_DIVISION	MESH Division	The Division Reference Table stores attributes related to MESH and Pre-SAMII division codes. SAMII does not contain a field that is equivalent to the division code.
REF_DPLN	Deduction Plan Reference Table	The Deduction Plan Reference Table stores the plans associated with each deduction type and contains processing information to allow Gross-To-Net to accurately calculate employee deductions. It includes amounts and percentages, what pay types are included, who is to receive the amount deducted, deduction frequencies, standard deduction amounts, and special deduction routines.
REF_DPOL	Deduction Policy Reference Table	The Deduction Policy Reference Table stores a list of the deduction policy codes. These policies allow deduction and fringe eligibility rules to be established for groups of employees.
REF_DSBL	Disability Reference Table	The Disability Reference Table stores a list of codes used to define disabilities.
REF_DSCG	Discharge Type Reference Table	The Discharge Type Reference Table stores discharge type codes used to record veteran information for an employee.
REF_ECSO	Case Officer Reference Table	The Case Officer Reference Table stores a list of persons who are responsible for incident and grievance cases.
REF_EEOC	EEO Job Category Reference Table	The EEO Job Category Reference Table stores the various categories of work used for EEO reporting.
REF_EEOE	EEO Employer Information Table	The EEO Employer Information Reference Table stores information about an employer (e.g., address, title, etc.) to be used in EEO reporting.
REF_EEOF	EEO Function Reference Table	The EEO Function Reference Table stores the functions used to classify the primary purpose of agencies and organizations. The classifications are used in EEO reporting.
REF_EEOL	EEO Location Reference	The EEO Location Reference Table stores codes for

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
	Table	the type of EEO location. It also stores the address of the school, annex, or other institution.
REF_EEOM	EEO Multi-Location Reference Table	The EEO Multi-Location Reference Table stores codes which associate different EEO locations.
REF_EEOR	EEO Rank Reference Table	The EEO Rank Reference Table stores codes that allow an institution to define rank for academic/tenure purposes separately from ranks required for EEO reporting. Academic rank does not need to equal EEO rank.
REF_EMPR	Employer Reference Table	The Employer Reference Table lists each employer code and related employer information. It is used with dependent information to coordinate health benefits.
REF_EMPS	Employment Status Reference Table	The Employment Status Reference Table stores status codes that indicate whether an employee may receive pay, accrue and use leave, and be counted in the workforce. A personnel action may result in a particular employment status for the employee. This table also designates which "base pay" parameter is valid for a particular status.
REF_EMPX	Extended Employment Status Reference Table	The Extended Employment Status Reference Table stores data used by the EEO batch consolidation program. It identifies whether an employee is included or excluded from the consolidation extract and worksheet report, and it indicates whether an employee is on sabbatical or leave.
REF_ERAT	Career Rating Reference Table	The Career Rating Reference Table stores the possible performance ratings for each Rating Type. These ratings are used for employee evaluations.
REF_ERTP	Career Rating Type Reference Table	The Career Rating Type Reference Table stores valid performance rating type codes. Performance rating types are used to identify the components of a performance evaluation.
REF_ETHN	Ethnicity Reference Table	The Ethnicity Reference Table stores ethnicity codes. This information is used in EEO reporting.
REF_ETYP	Evaluation type Reference Table	The Evaluation Type Reference Table stores evaluation type codes used to define performance evaluations.
REF_EVNT	Event Type Reference Table	The Event Type Reference Table stores pay and leave events, such as regular pay and annual leave. Information about each event is also stored here. For example, a pay event can be defined as reimbursable, FLSA-related, or as a fringe payment.
REF_FACT	Other Factor Reference Table	The Other Factors Reference Table stores a list of available codes used to define additional factors which may be used as criteria to judge applicants for a

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
REF_FICL	FICA Class Reference Table	position. The FICA Class Reference Table stores groupings of deduction types and plans used to define contributions to Social Security and Medicare.
REF_FINI	Bank GHRS Account Reference Table	The Bank GHRS Account Reference Table stores all bank accounts used in the system. Each bank account is assigned a bank account code for identification purposes within the system. All relevant bank information is noted for each bank account defined. The primary purpose of this table is to store the actual bank routing number and bank account number for each the system bank account code assigned to an employee paycheck.
REF_FLHR	FLSA Hours Reference Table	The FLSA Hours Reference Table stores codes that associate the number of days in a FLSA cycle with the maximum number of hours to be charged at the regular rate.
REF_FLPR	FLSA Profile Reference Table	The FLSA Profile Reference Table stores FLSA plans, including FLSA pay types and information required to accrue compensatory time in lieu of overtime pay.
REF_FLWK	FLSA Work Cycle Reference Table	The FLSA Work Cycle Reference Table stores codes which define different FLSA work cycles.
REF_GEOG	Geographic Area Reference Table	The Geography Table stores codes used to define geographic areas.
REF_GRDE	Grade Reference Table	The Grade Reference Table stores a list of grade codes. Grades are used in the determination of pay and leave accrual rates.
REF_INSC	Insurance Company Reference Table	The Insurance Company Reference Table stores a list of insurance company codes. It is used with dependent information to coordinate health benefits.
REF_IRTG	Interview Rating Reference Table	The Interview Rating Reference Table stores a list of rating codes used to standardize evaluations of applicants by assigned interviewers.
REF_ISTS	Incident Status Reference Table	The Incident Status Reference Table stores codes representing the possible statuses for each type of incident or grievance.
REF_ITYP	Incident Type Reference Table	The Incident Type Reference Table stores codes representing the types of incidents and grievances in which employees may be involved.
REF_JBRQ	Job Requirement Reference Table	The Job Requirement Reference Table stores sets of standards or tests which must be completed by an applicant for a job opening. Requirements may include licenses, tests and associated scores, and degrees.
REF_JNSR	Job Notice Status Reason	The Job Notice Status Reason Reference Table stores

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
	Reference Table	reason codes to be associated with job notice statuses. These codes allow additional information to be related to a particular status or job notice.
REF_JNST	Job Notice Status Reference Table	The Job Notice Status Reference Table stores a list of available job notice status codes and assigns an active or inactive status to each code.
REF_JNTP	Job Notice Type Reference Table	The Job Notice Type Reference Table stores a list of job notice types used to group job openings by general description (e.g., secretary or clerk).
REF_JOBS	Job Status Reference Table	The Job Status Reference Table establishes job status codes to indicate whether and employee's assignment is temporary, probationary, etc. The job status code is often used in conjunction with the employment status code (on REF_EMPS) for reporting purposes.
REF_JSTA	Job Statements Reference Table	The Job Statements Reference Table stores the codes under which job statements are stored on the Job Statement table (JBST). It also provides for a short and long description of the statement code.
REF_LAWF	Law Firm Reference Table	The Law Firm Reference Table lists attributes such as address, phone, and fax data associated with each law firm code.
REF_LDPR	Labor Distribution Profile Reference Table	The Labor Distribution Profile Reference Table stores multiple accounting distributions. Up to ten accounting distributions can be entered for each labor distribution profile. The percentage of distribution for each accounting line is also stored on this table.
REF_LEVF	Leave Frequency Reference Table	The Leave Frequency Reference Table stores leave frequency codes. These codes are used to accrue selected leave types on a schedule other than every pay period.
REF_LOC	Location Reference Table	The Location Reference Table stores address and phone information for pay and work locations.
REF_LPCT	Leave Policy Category Reference Table	The Leave Policy Category Reference Table stores a list of all leave categories for a given leave policy. For each category in the Leave Policy Category table, out-of-bounds thresholds for a leave balance are defined for daily leave processing and for periodic leave balance checking. An out-of-bounds action is specified for each out-of-bounds condition.
REF_LPET	Leave Event Type Reference Table	The Leave Policy Event Type Reference Table stores and defines all valid leave types for a given leave policy. For each leave type entered, leave event amount and edit and processing parameters (such as minimum and maximum amount limits) are specified.



TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		A Leave category is also assigned for each leave type on this reference table.
REF_LPOL	Leave Policy Reference Table	The Leave Policy Reference Table stores all leave policies used to govern employee leave processing. For each leave policy, a leave year end month is required to indicate the month when the year ends for leave-year-to-date balances.
REF_LPRL	Leave Progression Rule Table	The Leave Progression Rule Reference Table stores a mechanism for retrieving leave accrual rates which are based on length of service from the Leave Policy Rate table. The system calculates length of service using Event Date and the Leave Progression Start Date from the employee's assignment table.
REF_LPRT	Leave Policy Rate Reference Table	The Leave Policy Rate Reference Table stores information needed for automated leave accrual processing. It contains the guaranteed minimum leave accrual, the minimum number of hours required for accrual, the standard number of hours required, and the standard accrual rate for each leave type. The guaranteed minimum accrual and the standard accrual rate are expressed in the basis for the leave type (e.g., hours, days, weeks, etc.) and the minimum and standard required hours are always expressed in hours. Prorated accruals are based on the ratio of standard hours to standard accrual rate and applied to the pay period hours used for accrual.
REF_LTYP	License Type Reference Table	The License Type Reference Table stores each license type code used to build a license and certification history for each employee or applicant.
REF_MAJR	Formal Education Major Reference Table	The Major Reference Table stores codes which define formal education majors used in establishing an employee's educational history.
REF_MILB	Military Branch Reference Table	The Military Branch Reference Table stores the military branch codes used in defining the veteran's profile of an employee.
REF_MILR	Military Rank Reference Table	The Military Rank Reference Table stores the military rank codes used in defining the veteran's profile of an employee.
REF_MSTS	Marital Status Reference Table	The Marital Status Reference Table stores marital status codes used to create a personal attributes profile for each employee. Actual marital status can differ from tax marital status, so these values are stored on separate tables.
REF_NMCR	Name Change Reason Reference Table	The Name Change Reason Reference Table stores codes used to indicate the reason for a name change on

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		the Applicant Name Change (ANCH) and Employee Name Change (ENCH) transactions.
REF_OCCG	Occupational Group Reference Table	The Occupational Group Reference Table stores codes representing occupational groups, which are then used to categorize titles.
REF_ORGN	Organization Reference Table	The Organization Reference Table stores organization values and agency/organization relationships in the financial system. This table also stores an organization's manager name and default activity. An organization represents a further breakdown within each agency.
REF_PACT	Personnel Action Reference Table	The Personnel Action Reference Table stores codes representing actions that affect an employee's assignment. Among the items defined for these codes are the employee's employment status (e.g., if the desired action is to retire the employee, his employment status must be consistent with "retired"), how the action affects the workforce count, and whether the employee must serve a probationary period.
REF_PART	Personnel Action Reason Reference Table	The Personnel Action Reason Reference Table stores personnel action reason codes. These codes are used to associate reasons with personnel actions.
REF_PAYF	Pay Event Frequency Reference Table	The Pay Frequency Reference Table stores pay frequency codes. These codes are used to control the processing of pay events which are not taken each pay period.
REF_PEX2	Override Budget Level Reference Table	The Override Budget Level Reference Table stores budget levels for an expense category within a particular agency or agency/organization which is different from the one defined on the Expense Category table (PEXP).
REF_PEXP	Expense Category Reference Table	The Expense Category Reference Table stores the categories into which position budgeting transactions will be summarized. It defines the Pay Input Definition ID for a given category and the level (Agency, Organization, or Position) at which this category will be budgeted.
REF_PNST	Pension System Reference Table	The Pension System Reference Table stores pension system codes to use in coordinating pension deductions for multiple pension systems.
REF_PPET	Pay Policy Event Type Reference Table	The Pay Policy Event Type Reference Table identifies that a pay event is valid for the Pay Policy and defines the factors and components that affect its processing during Time-to-Gross.

<b>TABLE_NAME</b>	<b>TABLE_DESCRIPTION</b>	<b>TABLE_DESC</b>
REF_PPOL	Pay Policy Reference Table	The Pay Policy Reference Table stores pay policy codes that allow pay type eligibility rules to be established for groups of employees.
REF_PPRL	Pay Progression Rule Reference Table	The Pay Progression Rule Reference Table stores a mechanism for retrieving pay rates that are based on length of service or on service hours.
REF_PPRT	Pay Policy Rate Table	The Pay Policy Rate Table stores pay rates for each pay policy, based on grade, step, chart, and pay progression. These rates are used to calculate pay for employees who do not have rates established for a pay event on the Pay Parameter table.
REF_PREX	Name Prefix Reference Table	The Name Prefix Reference Table stores prefix codes for use in further defining an employee's name.
REF_PSBP	Budget Preparation Reference Table	The Budget Preparation Reference Table stores position budget prep codes used to link position control data to the position budget interface.
REF_PSBS	Position Budget Status Reference Table	The Position Budget Status Reference Table stores position budget status codes. These codes are used on the budget and actual adjustment transactions to indicate the purpose of the action, or the budget's new status as a result of the action. Possible status codes might include initial budget creation, adjustments, and closing.
REF_PSTP	Pass Type Reference Table	The Pass Type Reference Table stores the pass type codes assigned to employees on the Pass table (PASS).
REF_PSTS	Position Status Reference Table	The Position Status Reference Table stores codes which are used to create and maintain positions. Fields on this table define whether or not employees can be appointed to a position with the given status or whether or not it is a new or existing position.
REF_PUDF		The Position User Defined Fields Reference Table stores the definition of the position user entry screens (i.e., BKG_PUD1). This table allows for the definition of fields to be included on each PUD screen, and how each field should be edited.
REF_PYCL	Pay Class Reference Table	The Pay Class Reference Table stores codes that define groupings for employees who are paid in an identical manner (e.g., biweekly or exception-paid employees with annualized salaries). The Pay Class code on an employee's record tells the system how to interpret the pay rates it finds for the employee.
REF_PYGP	Payroll Group reference Table	The Payroll Group Reference Table stores payroll group codes. A payroll group is a collection of payroll numbers processed at the same time. This code is used during check production to group employees by check

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
REF_PYNO	Payroll Number Reference Table	stock. The Payroll Number Table stores payroll numbers, which are used to group employees whose pay is generated at the same time. This table also identifies the Payroll Group with which a Payroll Number is associated; payroll group is used in the specification of bank accounts and check numbers for check production.
REF_RANK	Agency Ranking Reference Table	The Agency Ranking reference Table stores codes which may be used by an applicant in ordering preferences (e.g., a preference for geographic location).
REF_RCMD	recommendation Reference Table	The Recommendation Reference Table stores a list of codes used by interviewers when evaluating the ability of an applicant to fill a job opening.
REF_REFR	Referral Source Reference Table	The Referral Source Reference Table stores codes which define sources that may have brought an applicant to the attention of the personnel department (e.g., employment service or current employee).
REF_RELT	Relationship Reference Table	The Relationship Reference Table stores relationship codes. These codes can be used to specify the relationship an emergency contact or dependent has to an employee, such as spouse or parent.
REF_RESD	Residency Reference Table	The Residency Reference Table stores a list of residency codes. In some jurisdictions, an employee's place of residence has significant personnel management implications. This optional code allows the user to establish the categories appropriate for the organization.
REF_RNKM	Tenure Rank Reference Table	The Tenure Rank Reference Table stores rank codes used in tenure tracking. It associates a tenure-related rank code to the rank codes required by EEO.
REF_RPRF	Performance Rating Profile Reference Table	The Performance Rating Profile Table stores and identifies the different sets of rating types for evaluating employee performance.
REF_RPYF	Reserve Payout Factor Reference Table	The Reserve Payout Factor Reference Table stores a reserve payout numerator and denominator associated with a pay class and pay cycle. This information is used in reserve pay processing or contract smoothing to calculate the amount of reserve accrual that should be paid out to employees in the specified pay class and cycle.
REF_RSLT	Activity Result Reference Table	The Activity result reference Table stores the list of possible outcomes for an activity which has been scheduled.

<b>TABLE_NAME</b>	<b>TABLE_DESCRIPTION</b>	<b>TABLE_DESC</b>
REF_SCHL	School Institution Table	The School Institution Reference Table stores each school or institution code. It is used to assist in building an education profile for an employee.
REF_SECTION	MESH Section	The Section Reference Table stores attributes related to MESH and Pre-SAMII section codes. SAMII does not contain a field that is equivalent to the section code.
REF_SFTF	Soft Fund Reference Table	The Soft Fund Reference Table stores codes which identify funds classified as providing "soft money", usually money from outside of the college or university. It is keyed by fund code and effective date.
REF_SKLL	Skill Level Reference Table	The Skill Level Reference Table stores the possible skill levels (or proficiency levels) for a given type of skill.
REF_SKLS	Skill Type Reference Table	The Skill Type Reference Table stores the types of skills an employee or applicant may possess.
REF_SPRQ	Special Requirement Reference Table	The Special Requirements Reference Table stores a list of codes which define any special requirements to be assigned to a job notice.
REF_ST	State Reference Table	The State Reference Table stores a list of country codes with its corresponding state codes. It is used to edit employee address information.
REF_STEP	Step Reference Table	The Step Reference Table stores a list of grade codes with corresponding step codes. Step can be used to define pay and leave accrual rates.
REF_STTL	Sub-title Reference Table	The Sub-Title Reference Table stores and identifies the set of pay, leave, deduction policies, and the FLSA profile that governs employees in a particular title.
REF_SUFY	Name Suffix Reference Table	The Suffix Reference Table stores suffix codes for use in further defining an employee's name or in listing designations, such as Ph.d.
REF_TAXC	Tax Class Reference Table	The Tax Class Reference Table stores the deduction types and plans that define income tax withholding for a group of employees. Each tax class might specify a federal tax code, a state tax code, and local tax codes.
REF_TAXD	Tax Reporting Description Reference Code	The Tax Reporting Description Reference Table stores report items to be used on the Tax Reporting table, along with their associated report IDs and long and short descriptions.
REF_TAXM	Tax Marital Status Reference Table	The Tax marital Status Reference Table stores a list of tax marital status codes that are used to calculate the appropriate brackets for deduction calculations. Tax

TABLE_NAME	TABLE_DESCRIPTION	TABLE_DESC
		marital status can be different from actual marital status, so they are stored on two different tables.
REF_TAXP	Tax Parameters Reference Table	The Tax Parameters Reference Table stores and defines tax rules by deduction type and plan and by tax marital status. This table includes jurisdiction-specific information such as standard exemption amount.
REF_TAXR	Tax Reporting Reference Table	The Tax Reporting Reference Table stores data used to define which pay, deduction and FICA categories are included in or excluded from various tax reporting processes, such as Form W-2 reporting and Form 941 reporting. It is also used to define inquiries for use on the Payroll Summary (QPYR) inquiry.
REF_TAXT	Tax Treaty Reference Table	The Tax Treaty Reference Table stores tax treaty information by country and income code to be used during 1042-S and W-2 processing. This table specifies the maximum amount of compensation that may be exempted from U.S. income tax withholding. This amount is then compared to the individual's income to determine how much should appear on the 1042-S form and how much should appear on the W-2 form.
REF_TBL1		
REF_TBL2		
REF_TBL3		
REF_TBL4		
REF_TBL5		
REF_TBL6		
REF_TBL7		
REF_TBL8		
REF_TBL9		
REF_TCAT	Title Category Reference Table	The Title Category Reference Table lists valid titles associated with a title category. Title categories are used to define groups of multi-allocated titles.
REF_TCLT	Title Classification Reference Table	The Title Classification Reference Table stores the classification codes for use in establishing full, part-time, seasonal, etc. designations for employees.
REF_TENS	Tenure Status Code Reference Table	The Tenure Status Code Reference Table stores codes that define the status of an employee in the tenure process (e.g., has tenure, on tenure track, off tenure track). It allows for specification of the automatic roll-over and review process.
REF_TETP	Test Type Reference Table	The Test Type Reference Table stores test types which may be a requirement for applying for a job.
REF_TICA	Titles in Title Category Reference Table	The Title In Title Category Reference Table lists each valid combination of a title and a title categories.

<b>TABLE_NAME</b>	<b>TABLE_DESCRIPTION</b>	<b>TABLE_DESC</b>
REF_TIMC	Time Category Reference Table	The Time Classification Reference Table stores codes that define time categories used to charge overtime hours to a different accounting distribution.
REF_TITL	Title Reference Table	The Title Reference Table stores codes that define an employee's job. It classifies the incumbent as to FLSA exemption, EEO job category, and occupational group. It defines the standard grade, title group, and pay range.
REF_TRKC	Tracking Code Reference Table	The Tracking Code Reference Table stores codes that are used to group employees together on tenure reports (e.g., has tenure, on tenure track, off tenure track, pending review).
REF_TTLG	Title Group Reference Table	The Title Group Reference Table stores title group codes that are used to group related titles (e.g., Computer Programmer I and Computer Programmer II belong to the group "Computer Specialist").
REF_TXEN	Taxing Entity Reference Table	The Taxing Entity Reference Table stores the Federal Identification Number (FIN) and state identification number for each employer at a multiple employer site.
REF_ULOC	Union Local Reference Table	The Union Location Reference Table stores union local codes for use in coordinating required employee deductions based on union membership.
REF_USDF		The Employee User Defined Fields Reference Table stores the definition of the employee user entry screens (i.e., BKG_USR1-9). This table allows for the definition of fields to be included on each USR screen, and how each field should be edited.
REF_VETS	Veteran Status Reference Table	The Veteran Status Reference Table stores a list of the veteran status codes used in defining the veteran's profile of an employee.
REF_WDAY	Work Day Reference Table	The Work Day Reference Table stores the daily schedule for a work cycle by month and year. This schedule is used in FLSA pay and contract pay calculation processes.
REF_WKCY	Work Cycle Reference Table	The work Cycle Reference Table stores codes defining work cycles. Attributes defined include shift code, start time, normal work days, number of days in the work period, and the number of scheduled hours per work period.
REF_WKTP	Work Type Reference Table	The Work Type Reference Table stores codes which describe the types of work an applicant or employee may have performed prior to pursuing employment at your site.

<b>TABLE_NAME</b>	<b>TABLE_DESCRIPTION</b>	<b>TABLE_DESC</b>
SUM_BENEFITS	Agency Benefits Summary Table	The Benefits Summary Table stores fringe benefit data at the benefit type level. Because employees are not on the summary record, agencies will have statewide access to this benefits data.
SUM_DEDUCTI ONS	Agency Deduction Summary Table	
SUM_DEMOGR APHICS	Demographics Summary Table	
SUM_EMP_RAT E		
SUM_EMP_SAL ARY		
SUM_EMPLOYE E	Employment Statistics Summary Table	
SUM_LEAVE	Agency Leave Summary Table	The Leave Summary Table stores leave data at the leave event type level. Because employees are not on the summary record, agencies will have statewide access to this leave data.
SUM_PAYROLL	Payroll Summary Table	The Payroll Summary Table stores payroll data at the pay event type level. Because employees are not on the summary record, agencies will have statewide access to this payroll data.
SUM_POSITION	Agency Position History Summary Table	



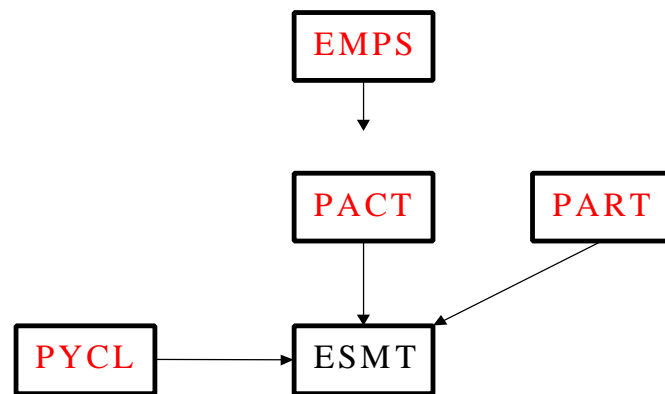




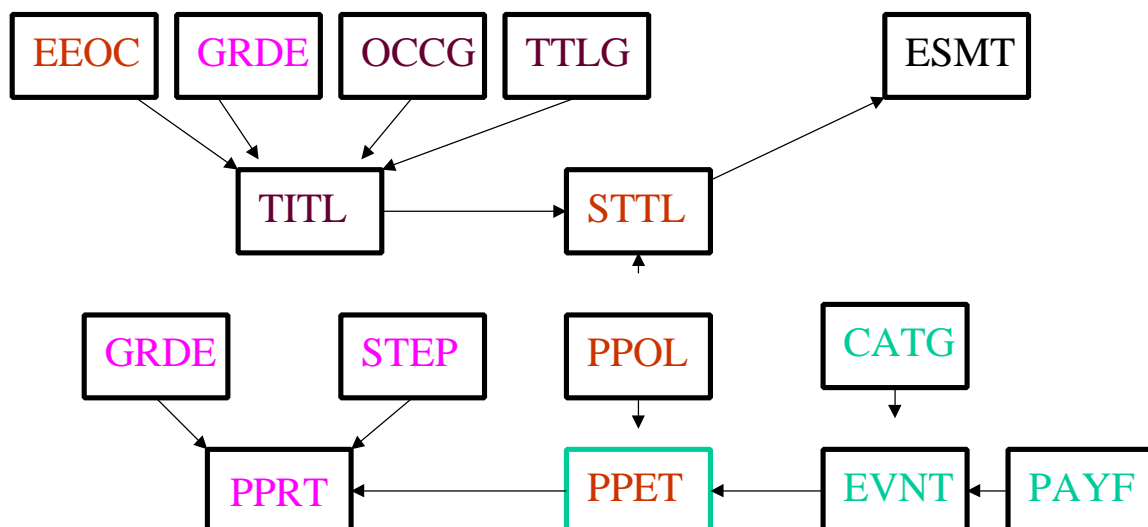


## SAM II HR/PAYROLL TABLE RELATIONSHIPS

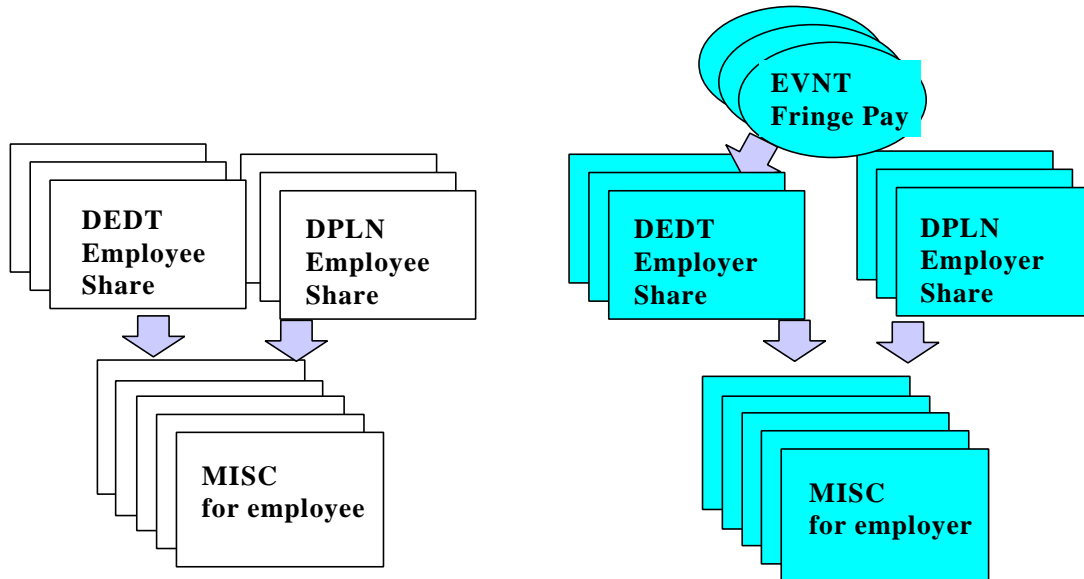
Identify Status/Types of  
Employees



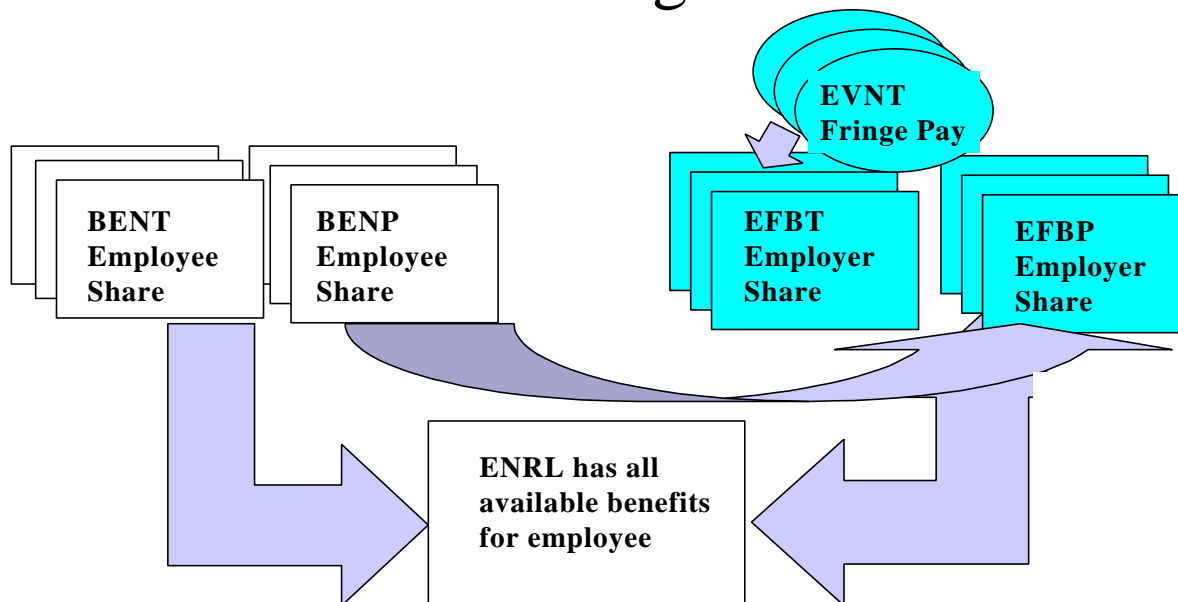
Pay



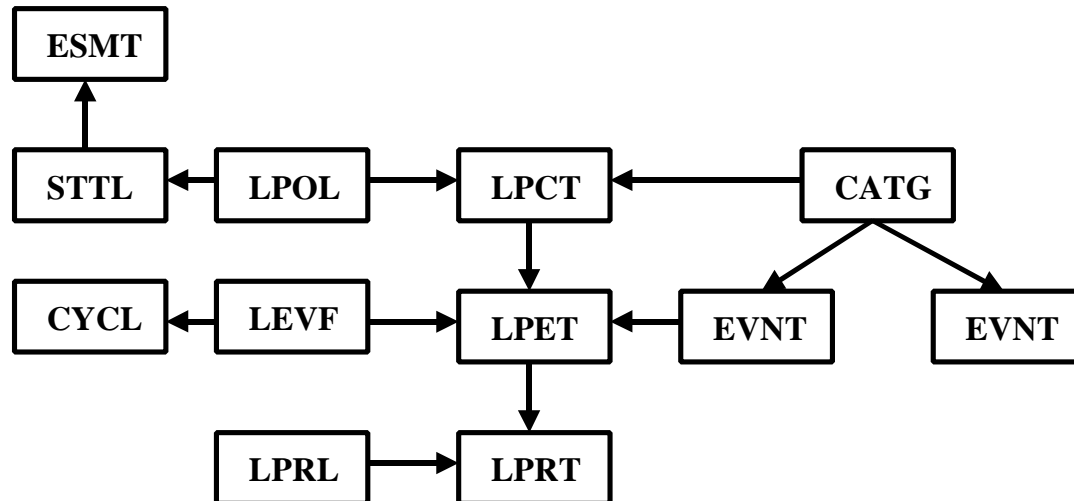
## Employee Deduction and Benefits Tables



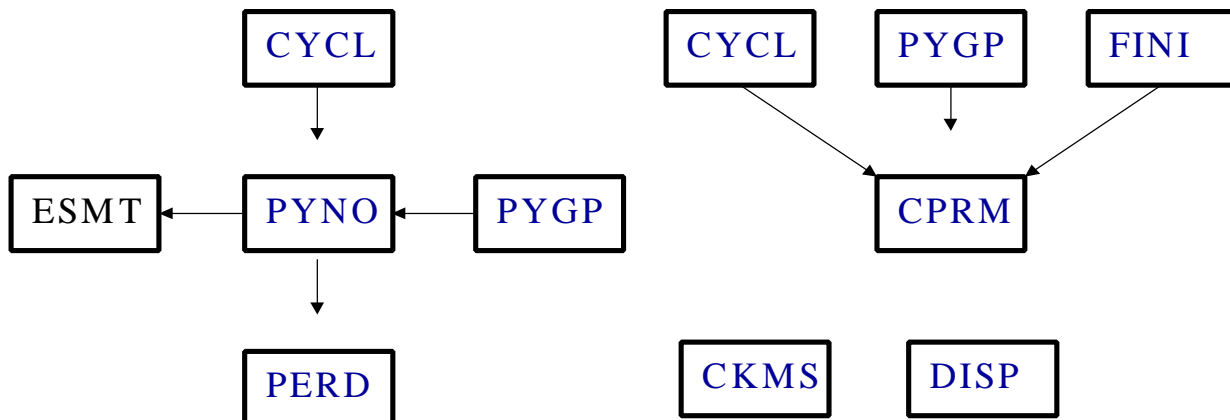
## Enrollment using Benefits



## Leave Setup Tables



## Establish a Calendar



## **COMPLETED REPORT DESIGN EXAMPLE**

STATE of MISSOURI  
REPORT DESIGN



Report Title

Requested by:	Gap Analysis	Date:	
Designed by:	ITAB User Group	Date:	
Last Modified by:		Date:	

Approvals:

ITAB USER GROUP	
Manager	Date

Subject Matter Expert	Date	Subject Matter Expert	Date
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Subject Matter Expert	Date	Subject Matter Expert	Date
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Subject Matter Expert	Date	Subject Matter Expert	Date
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**REQUIREMENTS ANALYSIS****Functional Requirements**

**This report is a list of employees who have birthdays during the current month. The report should only contain birthdays for one month.**

**Current Report Functionality**

Legacy Birthday List.

**MARCH BIRTHDAYS**

LAST NAME	FIRST NAME	MIDDLE INIT	DATE OF BIRTH
-----	-----	-----	-----
-	-	-	-
		--	
JUST	CLAUDETTE	T	03/01/1935
MANSAGER	DAVID	A	03/02/1950
UTZ	BRIAN	E	03/02/1952
PALMER	WILLIAM	F	03/03/1977
AUSTIN	LARRY	V	03/04/1926
LORD	CORNEL	Y	03/04/1947
SYSKA	DOUGLAS	D	03/04/1949
ABBOTT	CAROLE	I	03/04/1973
IRELAND	CLAUDE	U	03/04/1978
LUECKENOTTE	DEANNA	L	03/05/1928
GLASS	LESSIE	W	03/05/1962
NEW	JUDITH	N	03/06/1979
DUDEHNOEFFER	LILLIE	E	03/08/1955
COLE	GLENDA	G	03/08/1973
HUBER	LOGAN	R	03/09/1925
VERNON	CEPHA	R	03/10/1975
TREASURE	SCOTT	H	03/11/1958
DYE	JANE	Z	03/11/1970
BOLLMAN	MELANIE	U	03/12/1935
JENSEN	VIOLA	N	03/14/1950
TURNER	LINDA	O	03/15/1934
ODOM	RAYMOND	K	03/15/1937
ENGLISH	TERESA	V	03/17/1922
WALKER	JODY	M	03/17/1942
CHERRY	JOHN	X	03/17/1944
FARLEY	ROBERT	J	03/18/1921
KAMINSKI	ANDREW	Q	03/18/1929
KINSLOW	GEORGIA	J	03/18/1932

## **FUNCTIONAL REPORT DESIGN**

### **General Description**

This report is a list of employees who have birthdays during a certain month. The report should only contain birthdays for one month.

### **Report Functionality**

The report should be a list of employees.

The report should only contain employees in my agency.

The report should list each employee's last name, first name, and middle initial.

The report should show each employee's birthday.

The list should be sorted by Last Name.

The birthday should appear as 01/01/2000.

The list should only contain birthdays for one month.

### **Assumptions and Issues**

None.

## TECHNICAL REPORT DESIGN

### ANALYSIS PARAMETERS

#### Characteristics

Summary Data  
Point-in-Time Analysis

#### Entities

Employee  
Date

#### Attributes

Employee: Last Name  
Employee: First Name  
Employee: Middle Name  
Employee: Date of Birth  
Employee: Agency

#### Criteria

Employee: Agency = *my agency number*  
Employee: Date of Birth (Month) = Current Month  
  
Date format: MM/DD/YYYY

## TECHNICAL REPORT DESIGN

### TABLES AND JOINS

#### Tables

SNAP\_EMPLOYEE

#### Fields

SNAP\_EMPLOYEE  
    LAST\_NAME  
    FIRST\_NAME  
    MIDDLE\_NAME  
    DOB\_DATE  
    AGENCY

#### Join Architecture

No joins required.

## TECHNICAL REPORT DESIGN

### REPORT STRUCTURE

#### Grouping Criteria

No grouping.

#### Sorting Criteria

Primary Sort:  
LAST\_NAME, FIRST\_NAME

#### Totals

No totals.

### QUERY FORMAT

```
SELECT  GHRS_IN_EMPL_ID,  LAST_NAME,  FIRST_NAME,  MIDDLE-NAME,
DOB_DATE
FROM SNAP_EMPLOYEE_### AS A
WHERE CONCAT_DATE = (
    SELECT MAX(CONCAT_DATE)
    FROM SNAP_EMPLOYEE AS B
    WHERE A.GHRS_IN_EMPL_ID = B.GHRS_IN_EMPL_ID)
WHERE      MONTH(DOB_DATE) = MONTH(CURRENT_DATE)
```

## TECHNICAL REPORT DESIGN

### REPORT FORMAT

#### Visual Format

Report will look exactly like legacy report.

## **REPORT DESIGN TEMPLATE**

STATE of MISSOURI  
REPORT DESIGN



Report Title

Requested by:	_____	Date:	_____
Designed by:	_____	Date:	_____
Last Modified by:	_____	Date:	_____

Approvals:

_____	_____	_____
Manager	Date	Project Manager

_____	_____	_____
Subject Matter Expert	Date	Subject Matter Expert

_____	_____	_____
Subject Matter Expert	Date	Subject Matter Expert

_____	_____	_____
Subject Matter Expert	Date	Subject Matter Expert



## **REQUIREMENTS ANALYSIS**

### **Functional Requirements**

**Describe the general goal of the new report.**

### **Current Report Functionality**

Is this report replacing another? If so:

Note the name and number of the report(s) being replaced.  
Briefly but concisely describe the current functionality.

## REQUIREMENTS ANALYSIS

### Current Report Layout

Include samples of the current report.

## **FUNCTIONAL REPORT DESIGN**

### **General Description**

State the purpose of the report from a functional point-of-view. What business question is this report answering?

### **Report Functionality**

Detail the functionality of the report.  
Chart the source of data and how it functionally relates.

### **Assumptions and Issues**

Are there any assumptions being made about the question or the data?  
Are there any issues related to this report, this question, or this particular data?

### **Desired Report Layout**

Include a Mock-Up showing the layout of the report.

## **TECHNICAL REPORT DESIGN**

### **ANALYSIS PARAMETERS**

#### **Characteristics**

Summary or Detail level of detail? What is the Time Basis?

#### **Entities**

Identifying entities will identify the keys.  
What Functional Areas are involved?

#### **Attributes**

Identifying the attributes will identify the properties of the entities that the query is based on.

#### **Criteria**

The criteria are any values used in comparisons with the attributes to limit the selection of data involved in the query.  
The criteria will also define the manipulation or calculation involved in the derived fields. These manipulations and calculations will operate on the entities and attributes to arrive at the derived values.

## **TECHNICAL REPORT DESIGN**

### **TABLES AND JOINS**

#### **Tables**

Group the entities and attributes and determine the tables.

#### **Fields**

List the fields accessed on each table.

#### **Join Architecture**

Decide on join type between any two tables.

## **TECHNICAL REPORT DESIGN**

### **REPORT STRUCTURE**

#### **Grouping Criteria**

Controls totals.

#### **Sorting Criteria**

Decide on sorts.

#### **Totals**

What fields are totaled?

What levels are sub-totaled?

### **QUERY FORMAT**

Include any actual Query or SQL information here.

## TECHNICAL REPORT DESIGN

### REPORT FORMAT

#### Visual Format

Report Designer should include Report Mock-Up of the report, as it will look according to his/her current understanding of the request.

# REPORTS METHODOLOGY FLOW CHART

